

Abstract of the Invention

5 A portfolio-tracking module having a displayable summary interface
is provided within a software suite for enabling viewing and manipulation of
multiple categories of aggregated data compiled from a plurality of data
sources and accessible through a single interfacing node operated on a data-
packet-network.. The portfolio-tracking module comprises, an interactive
10 main interface accessible through the summary interface, the main interface
for listing stocks and investment accounts for viewing, an interactive menu
provided within the main interface for selecting views of individual
investment accounts, the views appearing within the same or within a
secondary interface, an interactive selection interface provided within the
15 main interface for selecting investment accounts for data tracking, a first
interactive hyperlink embedded within the main interface for linking the main
interface to a secondary interface for viewing tracked information about
personal investments and a second interactive hyperlink embedded within the
main interface for linking the main interface to a secondary configuration
20 interface for adding new investment accounts or stocks for tracking. A user
working from within the module may interact with selected ones of
interactive links for the purpose of invoking a variety of secondary interfaces
containing more detailed information about registered investments, financial
accounts, and performance data about stocks.